PTOLEMUS is the first strategy consulting firm focused on telematics and geolocation

Our consulting services

**Strategy definition**
Vision creation, strategic positioning, business plan development, board coaching & support

**Investment assistance**
Strategic due diligence, market assessment, feasibility study, M&A, post-acquisition plan

**Procurement strategy**
Specification of requirements & tender documents, launch of tenders, supplier negotiation & selection

**Innovation management**
Value proposition definition, product & services development, architecture design, assistance to launch

**Business development**
Partnership strategies, detection of opportunities, ecosystem-building, response to tenders

**Implementation**
Deployment plans, complex / high risk project & programme management, risk analysis & mitigation strategy

Our fields of expertise

**Car infotainment & navigation**
Connected services (Traffic information, fuel prices, speed cameras, weather, parking, points of interest, social networking), driver monitoring, maps, smartphone integration, smartphone-, PND- or embedded navigation

**Usage-based charging**
PAYD / PHYD insurance, road charging / electronic tolling, fleet leasing & rental, car sharing, Car As A Service, etc.

**Telematics & Intelligent Transport Systems**
ADAS, connected vehicle, crowd-sourcing, fleet management, eCall, bCall, SVR, tracking, vehicle data analytics (OBD / CAN-bus), VRM, V2X, xFCD

**Positioning / Location enablement**

**M2M & connectivity**

PTOLEMUS
Introduction to the 2016 study

Not just the most comprehensive report on UBI, but the biggest ever written study on telematics

- 1000+ pages of research using:
  - 286 interviews in 28 countries
  - 5 years of research performed by 6 consultants in 4 countries
  - Insights from 25+ consulting projects
  - Our experience & vision of the ecosystem incl. OEMs and TSPs
  - 422 figures (charts, tables, etc.)
- 42 case studies including Allianz, AllState, Carrot Insurance, Vodafone Auto, Ingenie, OnStar- Progressive, Discovery Insure, Liberty Mutual, Octo Telematics, Renault Amaguiz, State Farm, Unipol, Zurich
- A handbook of 69 suppliers' solutions including our own evaluation and ranking
- 28 insurance markets profiled
- 2020 & 2030 market forecasts
  - Canada, US, Latin America, Europe, Russia, South Africa, India, Chinese and Japan
  - Personal line / commercial line
  - Aftermarket / OEM
- Analyses of the disruptive forces at play
  - ADAS and autonomous vehicles
  - The eCall & ERA Glonass mandates
  - The rise of smartphone apps
  - Big Data & analytics
- Targeted recommendations for insurers, regulators, TSP, OEMs and operators

* Italy, the UK, France, Germany, Russia and the US
4 of the 8 authors of this report combine 60 years of experience in the automotive, telematics and connected services

Frederic Bruneteau, Managing Director, Brussels  
(fbruneteau@ptolemus.com)

Mr. Bruneteau has accumulated nearly 20 years of experience including 17 years of experience of the mobility domain and 8 years of strategic and financial advisory for companies such as Arthur D. Little, BNP Paribas, SFR Vodafone and TomTom. He has become one of the world’s foremost experts in the field of telematics, quoted by numerous publications such as The Economist and Reuters. He has spoken at more than 20 international conferences on the subject.

Sergio Tusa, Associate Partner, Milan  
(stusa@ptolemus.com)

Sergio Tusa has gained over 20 years experience in the telematics, location-based services and automotive domains. Before PTOLEMUS, Sergio held management responsibilities with Magneti Marelli (Fiat Group), Cobra Automotive, Nokia, Tele Atlas and Philips. He has led several insurance telematics and stolen vehicle recovery projects, for clients such as Cobra, Ferrari, Fiat and Renault/Volvo Trucks.

Matthieu Noël, Consultant, Paris  
(mnoel@ptolemus.com)

Matthieu Noël has gained 6 years of experience in the automotive industry covering technical, strategy, marketing and business development, including more than 4 years in consulting. Mr Noël has performed more than 20 assignments in the automotive and telematics industries. He understands the business and strategic implications of new technologies in the mobility eco-system and can adapt quickly to new industries and situations.

Thomas Hallauer, Director of Research & Marketing, London  
(thallauer@ptolemus.com)

Thomas Hallauer has gained 12 years of marketing experience in the domain of telematics and location-based services. He is an expert in new products and services notably in the telematics, motor insurance, electronic tolling and positioning industries. Before PTOLEMUS, Thomas held management responsibilities with Mobile Devices, a leading provider of telematics technology platform and devices and with FC Business Intelligence (Telematics Update).
The study results from extensive primary research

Based on interviews of more than 200 new companies in 30 countries including 86 insurers & brokers
The most comprehensive analysis of the telematics insurance market

The main document is 810 pages of analysis, examples, case studies, forecasts and recommendations
6 ways telematics will disrupt insurance analysed

1- **BIG DatAnalytics: the future scores and actuarial models**
   - How to leverage telematics with analytics.
   - Which data to collect and what factors to rate.
   - How to use contextual information
   - 10 analytics company profiles.

2- **The impact of autonomous safety functions on the motor insurance industry**
   - Present and forthcoming autonomous functions affecting insurance
   - Speed of the technical evolution and emergence prediction
   - Analysis and forecast of the effect on UBI

3- **The benefits and (lost) opportunities of telematics in accident and claims management**
   - Internal and external forces affecting the claims management sector examined
   - Case studies of successful implementations and best in class usage of data in claims
   - Recommendations to entice the claims departments

4- **The advent of mobile-based UBI becoming the default proposition**
   - Detailed assessment of the current mobile UBI initiatives worldwide - Key solution providers analysis
   - Range of business models assessed and compared
   - Technical capabilities and the remaining constraints studied

5- **The present and future usage of the OBD dongle and its data**
   - Overview of the OBD technology and its capabilities
   - VAS and service augmentation opportunities explored
   - Analysis of OBD data's main channels to market
   - Assessment of the key independent connected car service providers.

6- **The rapidly changing role of car manufacturers in the UBI market**
   Analysis of the current OEMs position on telematics services and UBI.
   Assessment of the opportunities for insurers to use OEM data
   Likely models for insurance - OEM partnerships.
   OEM data distribution strategy recommendation
The quantitative analytics validates each argument

Illustrated by 422 graphs validating each statement
Complemented by 78 company and solution profiles
A worldwide comparison of key geographical markets

28 countries analysed in depth

- Critical rating data includes
  - Gross written **premiums**
  - Number of **policies**
  - Cost of **claims**
  - Loss and expense **ratios**

- Influential **economic parameters** and **UBI activity** analysed

- **Environment factors** presented such as:
  - Claims frequency and severity
  - Vehicle **density**,
  - **Theft** rate or
  - Cultural factors

- **Readiness index** for each national market
The first insurance market forecast to estimate the impact of autonomous safety functions

Market forecasts to 2020 and 2030

- Over 2400 line Excel sheet based on our 6000-line bottom up model using more than 2500 lines of inputs.
- Updated until January 2016 with the latest available market figures compiled from interviews and secondary research.

Split by geography, technology and business models

- 16 areas including USA, Canada, France, Germany, Italy, UK, Japan, China, India, Brazil, South Africa, Russia, LATAM, etc.
- 7 technologies (line-fitted OBUs, professionally installed and self installed black boxes, light OBD dongles, connected OBD dongles, windscreen devices & CLAs, smartphones).
- Differentiated by channels and segments: aftermarket / OEM, personal / commercial, channels...
- The impact of ADAS & autonomous cars on premiums.

Market size (volumes & revenues) for insurers, TSPs, TTPs, OEMs and MNOs.

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PTOLEMUS
In-depth analysis of the European and US regulatory drivers

The legal landscape explained by legal experts

- **Identify the regulatory drivers that will influence your UBI strategy, including:**
  - The **requirement on insurers** regarding data management and protection
  - The **eCall, ERA Glonass** and **EOBR** mandates
  - The **Viberto Judgement**
  - The **European Data Protection Directive** progress
  - The **privacy regulations** and industry best practices
  - The **patents** in place and current **Intellectual property** litigation proceedings
This report has one objective: helping insurers transform Big Data **copper** into Analytics **gold**

- Analysis of the pricing and data management policies of the 27 largest UBI programmes including:
  - Admiral, Allianz, Allstate, American Family, AXA, Generali, Desjardins, Direct Line Group, State Farm, The Hartford, UnipolSai, Uniqa and Zurich

- Based on 40 in-depth interviews with Telematics Service Providers (TSPs), analytics providers and insurers

- 5 interviews transcribed: Nationwide, Insurethebox, LexisNexis Wunelli, Octo Telematics and The Floow

- Illustrated by case studies from companies using advance analytics such as: Progressive, Generali, Insure the box and many more

- Profile and review of 10 advanced analytics suppliers active in UBI
  - Accenture, Cambridge Mobile Telematics, Cognizant, HERE, IBM, IMS, SAS, Verisk Analytics and Willis Towers Watson

- Findings and recommendations validated by 150 academic papers and journals

- All that in a 340+ page document with over 150 graphs and tables

- Resulting in 20 best practices including recommendations on how to record and process driving data, score drivers and interact with them.

Download the 90-page abstract today at [www.ptolemus.com/cia-abstract](http://www.ptolemus.com/cia-abstract)
The CIA report is a searchable pdf document that can be used by the whole company, worldwide.

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**Reports**

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<thead>
<tr>
<th>Connected Insurance Analytics Report Only</th>
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<tbody>
<tr>
<td><img src="PTOLEMUS.png" alt="Image" /></td>
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<tr>
<td><strong>Contents</strong></td>
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<tr>
<td>- 340-page study</td>
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<tr>
<td>(pdf format, password-protected)</td>
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<tr>
<td>- 10 company profiles</td>
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<tr>
<td>- 20 best practices</td>
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<tr>
<td>- Recommendations to insurers and analytics providers</td>
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<tr>
<td><strong>Company-wide licence</strong></td>
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<tr>
<td>€3,995</td>
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<td>Approx. $4,350</td>
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For more information and to order the update if you already have the UBI Global Study 2016, contact me at fbruneteau@ptolemus.com

Notes: Prices in Euros excluding VAT (VAT applicable to clients located in Belgium)
The UBI Study is a searchable PDF document that can be used by the whole company, worldwide.

More than a report, a real strategic market analysis.

**Reports**

- 1,200+-page study (PDF format, password-protected)
- Bottom-up 2015-30 market forecasts outputs with graphs (Excel format, password-protected)
- 69 company profiles (Analytics suppliers, TSPs, TTPs, start-ups)
- 30 country profiles

**Full Study**

with 2020 & 2030 market forecasts

**Contents**

- 1,200+-page study (PDF format, password-protected)
- Bottom-up 2015-30 market forecasts outputs with graphs (Excel format, password-protected)
- 69 company profiles (Analytics suppliers, TSPs, TTPs, start-ups)
- 30 country profiles

**Company-wide licence**

€ 8,990

Approx. $10,300

For more information and to order the study, contact fbruneteau@ptolemus.com

Notes: Prices in Euros excluding VAT (VAT applicable to clients located in Belgium)
We also issue a quarterly dashboard of the UBI market

- 60-page barometer of the global UBI industry
  - Covers 170 companies
  - Covers the US, Canada, France, Germany, Italy, Spain and the UK
  - Issued on a quarterly basis
  - 190 charts, tables & figures

- Estimates UBI volumes and sales for all main players
  - Insurance companies
  - TSPs
  - Technology providers

- Deciphers the key market trends
  - UBI penetration
  - Number of programmes
  - Mix by business model (PAYD, PHYD, TBYB, etc.)
  - Market share of all main insurers, TSPs and device makers
  - Technology mix (Black boxes, OBD, apps, etc.)
  - Business line mix
  - Segment mix (Young drivers, mature drivers, etc.)
  - Channel mix aftermarket / OEM

- Brings most important market news

For more information and pricing details, please contact us on thomas@ptolemus.com
For more information, contact Thomas Hallauer at thallauer@ptolemus.com
Clients across the mobility ecosystem...

**Analytics providers**
- ANA
- Cognizant
- Google
- LexisNexis
- SAS
- TOWERS WATSON
- Wunderful

**Automotive manufacturers & suppliers**
- Agero
- Alibiquity
- cobra
- DIRECTS
- DATANV
- EDIUS
- Harman
- Michelin
- NEXUS
- OROO
- QUALCOMM
- SIERRA WIRELESS
- Telit
- TOYOTA
- TOYOTA TSUSHO

**Mobile telecom operators**
- SFR
- Sprint
- TELEkom Austria Group
- SK telecom
- verizon

**ITS operators, regulators & fleets**
- ARKAN
- arvento
- drivefactor
- FleetComplete
- Fleetmatics
- CGI
- egis
- Euromaster
- Thales
- Sofico
- SICK
- VITRONIC

**Applications providers**
- BMJ Group
- censio
- CCC
- Comnedli
- Comintel
- TOMTOM
- ESRI
- Moveclic
- RoadPilot
- wejo

**Telematics solution providers**
- ARKAN
- arvento
- drivefactor
- FleetComplete
- Fleetmatics
- CGI
- egis
- Euromaster
- Thales
- Sofico
- SICK
- VITRONIC

**Insurers, aggregators & assistance providers**
- ADMIRAL
- Allianz
- Axa Nicaragua Seguros
- CEA
- Desjardins
- eu乃是 assistance
- Europ Assistance
- Liberty Mutual
- MCR
- Menonart
- MONBAN
- MONDIAL Assistance
- NEXUS
- QAZ
- RSA
- SAFEFLEET
- UIA
- VERK
- VISTRA

**Banks & private equity investors**
- Anadarko Capital Partners Limited
- The Bailport Group
- C Capitol
- INVESTCORF
- LEDERER & PARTNERS
- New Amsterdam
- NOAURA
- ORION
- Paterson, Simon & Co.
- Pay
- THE HERRMANN GROUP
- Hutton Collins
- J warming & Co.
- Ikuhara & Associates
- INTREPID GROUP
- INTEK GROUP